This project is funded by the European Union

Ref. Ares(2025)5173569 - 28/06/2025

EPD-NET

Filling the Gap: Development of Ecological Planning and Design Learning Network and Adaptive Smart Training Module for Disaster Resilient and Sustainable Cities

PROJECT MONITORING PLAN

The EPD-Net digital learning network for disaster-resilient and sustainable cities adopts a well-structured project monitoring strategy during project implementation.

This project is funded by the European Union

EPD-Net Project Monitoring Plan

Deliverable Code: D1.3
Work Package: WP1 – Project Management
Lead Institution: Eskisehir Technical University (ESTU)
Contributing Partners: All Partners
Submission Date: M4 - June 2025
Version: v08

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ABBREVIATIONS

AB	Accreditation Body
AI	Artificial Intelligence
AIJU	Asociacion De Investigacion De La Industria Del Juguete Conexas Y Afines
AU	Ankara University
BS	Basarsoft
CTLA	Turkish Chamber of Landscape Architects
CU	Cukurova University
DAF	Deviation Alert Form
EQF	European Qualifications Framework
ESG2015	European Standards and Guidelines for Quality Assurance
ESRI	Environmental Systems Research Institute Turkey Branch
ESTU	Eskisehir Technical University
GA	Grant Agreement
GIS	Geographical Information Systems
HEI	Higher Education Institution
HU	Harran University
IFLA	International Federation of Landscape Architects
IKU	Istanbul Kultur University
KPI	Key Performance Indicator
LAAA	Latvian Association of Landscape Architects
LBTU	Latvia University of Life Sciences and Technologies
LE	Large Enterprise
MENDELU	Mendel University in Brno
M	Month
NC	NetCAD
NGO	Non-Governmental Organisation
NLP	Natural Language Processing
NMBU	Norwegian University of Life Sciences
PC	Professional Chamber
PI	Performance Indicator
PF	Previform - Laboratório, Formação, Higiene e Segurança no Trabalho, Lda
PM Team	Project Management Team
PMS	Project Management System
QAP	Quality Assurance Plan
RI	Research Institute
SC	Steering Committee
SK	Semantic Kernel
SME	Small and Medium Enterprise

SPU	Slovak University of Agriculture in Nitra
TAPLAK	Design and Planning Accreditation Board
THCA	Turkish Healthy Cities Association
VET	Vocational Education and Training
VSB	Technical University of Ostrava
WP	Work Package

Executive Summary

The **EPD-Net Project Monitoring Plan (PMP - D1.3)** defines the framework, tools, roles, and reporting flows that ensure systematic project implementation tracking across its 36-month duration. Developed under WP1 and in synergy with the Quality Assurance Plan (QAP - D1.1) and Risk Management Plan (RMP - D1.2), this document outlines a **robust, multi-level monitoring architecture** aligned with the Grant Agreement (GA No: 101183961).

Core Objectives and Scope

The monitoring system addresses six core domains:

- **Progress**: Are tasks and deliverables on track?
- **Performance**: Are outputs aligned with quality assurance criteria?
- **Finance**: Are budget and cost management tracked by the respective partner and requirements met?
- **Participation**: Are all partners fulfilling their roles?
- **Engagement**: Are stakeholders meaningfully involved?
- **Sustainability**: Are outcomes being embedded for long-term use?

The monitoring scope includes all WPs (WP1–WP6), deliverables (D1.1 – D6.5), and project events, supported by a shared calendar and escalation logic.

Tools and Indicators

The monitoring process is driven by:

- **ClickUp** as the central operational tool for task tracking, Gantt charts, dashboards, checklists, templates and team collaboration,
- A standardised set of performance indicators (PI),
- A **colour-coded Traffic Light System** to assess risk levels and alert decision-makers.

Roles and Reporting Structure Related to Monitoring

Responsibility is distributed across the following:

- **Task Contributors** (day-to-day tracking)
- **WP Leaders** (monthly consolidation and analysis)
- **Project Coordinator (ESTU)** (reporting processes and EC updates)
- **PM Team** (validation and performance benchmarking)
- **Steering Committee (SC)** (strategic review and mitigation decisions)

A structured reporting flow ensures timely decision-making and compliance with EC requirements.

The PMP ensures continuity by systematically integrating data flows into the quality assurance framework throughout the entire 36-month project cycle. Monitoring outputs—such as PIs, partner-level progress, and stakeholder feedback loops—are directly aligned with quality assurance mechanisms to support ongoing evaluation and continuous improvement.
This plan is applicable across all partner institutions and pilot regions, covering technical, pedagogical, and administrative dimensions. It is further adapted to the specific operational contexts of each work package (WP) and functions across multiple levels, including institutional implementation, inter-partner coordination, and stakeholder engagement.

To ensure that monitoring remains a strategically effective tool for achieving project goals, a dedicated performance review mechanism is introduced**.** This includes periodic and systematic reviews of monitoring outputs, alignment scoring between PIs and project objectives, and targeted improvements to reporting or partner engagement where gaps are observed. The insights gained from this process will be used to continuously refine the monitoring framework and enhance its strategic value throughout the project lifecycle.

1. INTRODUCTION

PMP is a foundational governance document developed under WP1 – Project Management of the EPD-Net Project. Its purpose is to define the systematic, continuous, and responsive approach that the consortium will adopt to track the implementation and performance of all project activities across all WPs and partners throughout the entire lifecycle of the project (36 months).

This PMP aims to:

- Establish a common monitoring language and standard across all partners and WPs
- Define what will be monitored, by whom, when, how, and with what tools
- Enable early detection of deviations, bottlenecks, or underperformance risks
- Provide a formal basis for internal coordination, mid-term corrections, and reporting
- Foster a culture of shared responsibility and adaptive learning within the EPD-Net consortium

Monitoring in the EPD-Net Project is not merely an administrative exercise to verify deadlines and deliverables. It is understood as a strategic management instrument, integrally connected to the project's vision of building a digital, interdisciplinary, and inclusive educational infrastructure for ecological planning and disaster-resilient cities. As such, the PMP serves both formative (learning-oriented) and summative (accountability-driven) functions by enabling real-time insights, early warnings, and evidence-based decision-making.

1.1 Strategic Relevance within the Project Management System (PMS)

This plan is one of the four key regulatory documents ensuring the internal coherence, transparency, and traceability of the EPD-Net Project implementation process. It is developed alongside and in full alignment with:

- QAP (D1.1) – which outlines quality principles, PIs, evaluation tools, and review procedures across all WPs,
- RMP (D1.2) – which identifies known and potential risks, scoring mechanisms, mitigation strategies, and escalation pathways, and
- ESP (D1.3) – which assesses the project's effectiveness, relevance, quality, engagement, and long-term impact. Besides, Communication Management Plan serves as a valuable input for PMP, which enables effective communication with all partners and stakeholders throughout the process.

These documents form a comprehensive management architecture where each feed into and strengthens the others. Specifically:

- Monitoring data serves as the factual basis for both quality assessments and risk detection.
- PIs help define what is to be monitored and how performance is judged.
- Risk flags signal areas requiring intensified or adaptive monitoring.
- QAP, RMP, PMP, and ESP are structurally integrated within WP1 and directly overseen by the Project Coordinator (ESTU), PM Team, and SC.

This interconnectedness ensures that monitoring does not function in isolation but is embedded into the overall learning and project management.

1.2 Monitoring as a Multi-Dimensional Function

Given EPD-Net's diverse structure—encompassing academic partners, VET institutions, NGOs, local governments, and professional bodies—the monitoring function must address multiple dimensions simultaneously. Accordingly, the PMP defines monitoring in six mutually reinforcing layers:

Monitoring Dimension	Focus Area
Progress Monitoring	Task completion, timeline adherence, deliverable submission
Performance Monitoring	Achievement of expected results, quality benchmarks, usability of outputs
Financial Monitoring	Properly and efficiently using of project budget allocated for WPs, tasks, and to different partners
Participation Monitoring	Level and quality of partner contributions, role clarity, task-sharing effectiveness
Engagement Monitoring	Stakeholder participation, outreach responsiveness, feedback loops
Sustainability Monitoring	Institutional anchoring, policy relevance, potential for adoption, and replication

These dimensions are not static; they evolve in intensity and focus depending on the project phase, WP dynamics, and external environment (e.g. policy developments, feedback from pilot sites, stakeholder needs).

This PMP directly responds to the project proposal commitments and the related GA Articles.

2. MONITORING STRATEGY AND METHODOLOGY

The EPD-Net Project monitoring system is designed as a **multi-layered, structured, and responsive mechanism** for overseeing the project's implementation. It functions as both an internal coordination instrument and an external accountability tool, ensuring that progress toward objectives is not only tracked but also interpreted, adjusted, and improved in real time.

This section outlines the conceptual framework, methodological structure, procedural flows, and supporting tools that make up the EPD-Net Project monitoring strategy.

2.1 Conceptual Monitoring Logic

Monitoring in the EPD-Net Project is guided by the principle that **complex, multi-partner, innovation-oriented projects require iterative and reflexive oversight mechanisms**. Monitoring is not simply about checking boxes; it is about detecting and interpreting signals of deviation, opportunity, or friction before they manifest as delays, inefficiencies, or failures.

To that end, the monitoring system integrates:

- **Formative monitoring**: for learning, coordination, and adaptation
- **Summative monitoring**: for accountability, evaluation, and reporting
- **Developmental monitoring**: for emerging practices, innovation quality, and stakeholder engagement

These logics are deployed in ways that reflect the nature of each WP, the timeline of the project, and the diversity of outputs.

2.2 Key Monitoring Objectives

The monitoring system is structured around six key objectives:

Objective	Monitoring Function
O1. Timeliness	Ensure that tasks, milestones, and deliverables are completed according to the Gantt chart and proposal commitments
O2. Quality Alignment	Track whether outputs meet internal quality assurance benchmarks and user/stakeholder expectations
Q3. Financial Alignment	Track whether the distributed budget is managed in line with the WPs and tasks, and according to the GA requirements by the partners
O4. Role Fulfilment	Monitor partner participation, responsibility-sharing, and workload balance
O5. Risk Synchronization	Integrate real-time data to inform the risk register and support contingency triggers

Objective	Monitoring Function
O6. Reporting Preparedness	Provide verified data for continuous reporting, mid-term review, and final evaluation

These objectives are directly mapped to indicators, frequencies, data sources, and responsible actors, as described in Section 3.

2.3 Methodological Components

The EPD-Net Project monitoring methodology is built on **three core components,** which are managed through the Clickup PMS.

a) Data Collection Sources

Monitoring data is drawn from both quantitative and qualitative sources:

- Partner reports
- Task-level completion logs
- Meeting minutes (WP and SC levels)
- Internal evaluation tools (checklists, dashboards, etc.)
- Participant feedback (for pilots and events)
- EPD_Assist data analytics (for module engagement)
- Quality control checklists created by the respective WP Leaders and versioned deliverables
- Stakeholder and user interviews (via relevant WPs)

b) Monitoring Instruments

The following instruments ensure structured data flow and standardisation:

Instrument	Description
Monitoring Table (WP-level)	Tracks each task's status, completion %, and deviations
Traffic Light System	Red–Orange–Yellow–Green indicators per deliverable
Progress Dashboards	Updated quarterly, visualises project progress and partner activity
Partner Contribution Matrix	Monitors workload distribution and role performance
Deviation Alert Form (DAF)	Used to flag unexpected delays or changes for SC review
Quarterly Monitoring Report (QMR)	Consolidated by the WP1 Leader/PM Team for the SC and quality assurance reference
EC Continuous Reporting Logs	Syncs monitoring results with EC Sygma portal obligations

c) Monitoring Timeline

Monitoring activities follow a tiered frequency:

- **Task Level** → Continuous
- **WP Level** → Monthly
- **Consortium Level** → Quarterly
- **Milestone Checkpoints** → M4, M5, M6, M7, M12, M13, M21, M25, M29, M33, M36
- **Deliverable Completion Points** → As per Gantt chart

3. MONITORING ROLES AND RESPONSIBILITIES

This section details the institutional and individual roles involved in project monitoring, the horizontal and vertical flows of information, and the integration of **ClickUp** as the project's central operational platform.

3.1 Consortium-Wide Monitoring Architecture

EPD-Net's monitoring structure is distributed across five complementary governance layers:

Level	Actors	Monitoring Role
Task-Level	Task Leader/Team Members	Track daily progress, update status on ClickUp, and report blockers
WP-Level	WP Leaders	Consolidate data, review deviations, and ensure partner performance
Project-Level	Coordinator (ESTU)/PM Team	Integrate WP reports, generate QMRs, and update EC portal
Quality Oversight	PM Team	Validate monitoring data, ensure compliance with D1.1
Strategic Oversight	SC	Review progress, approve mitigation actions, authorise reallocations or revisions

Each layer communicates with both its immediate adjacent levels (upward and downward) and across WPs where coordination is necessary.

3.2 Role Profiles and Duties

a) Project Coordinator – ESTU

- Maintains the **master monitoring system** and oversees data integration from all WPs
- Updates the **EC Continuous Reporting Platform** with monitoring-derived data
- Oversees compliance with the **Monitoring Calendar** and data submission deadlines
- Reviews all partner and WP-level reports within and generates alerts as needed
- Ensures traceability of decisions taken in response to monitoring insights

The PM Team assists the Project Coordinator in their tasks, while WP1 Leader - HU takes over relevant responsibilities due to their role in project management.

b) WP Leaders

- Monitor the **progress of tasks** and deliverables within their WP
- Ensure that all team members **maintain task status and documentation** on ClickUp

- Compile **Monthly WP Monitoring Notes**, including task status, progress %, partner input, deviations
- Cross-check against **PIs** and update the Risk Register if red flags are detected
- Ensure that any **changes to timelines, dependencies, or outputs** are reflected in ClickUp Gantt view

c) Task Leader/Team Members

- Responsible for **day-to-day updates** to task cards in ClickUp (e.g., subtasks, status, deadlines, attachments)
- Communicate **any emerging risks, delays, or dependencies** to the WP Leader
- Upload deliverables or internal drafts to the shared repository and link to ClickUp task cards
- Provide self-reporting on engagement levels and workload balance when requested by the WP Leader

d) PM Team

- Validate the **completeness, consistency, and timeliness** of monitoring reports
- Conduct **cross-WP comparative reviews** to detect discrepancies or hidden performance gaps
- Feed monitoring insights into the QAP's necessary parts
- Review task completion logic in ClickUp and flag non-aligned dependencies or duplicated efforts
- Provide recommendations to the SC for quality-related mitigation actions based on monitoring data
- Issues formal **QMR** shared with the consortium and SC

e) SC

- Meets quarterly to **review aggregated monitoring data and trends**
- Approves proposed adjustments to tasks, timelines, budgets, and deliverables
- Responds to **DAFs** or escalated risk situations
- Issues **formal resolutions**, logged in the SC Decision Log (stored in shared repository)
- Validates the **corrective action plans** stemming from persistent underperformance or partner disengagement

3.3 Role of ClickUp in Monitoring Coordination

ClickUp is the **primary operational interface** for project task monitoring. Its structure is adapted to reflect EPD-Net's WP and deliverable hierarchy, allowing for real-time, transparent, and collaborative tracking of implementation. By using this PMS, time can be saved by means of automated processes,

inconsistencies can be avoided, and access to all project-related information for everyone (as long as the required permission criteria are met) is ensured.

ClickUp Configuration Includes:

- **Space Structure**: One workspace per WP (e.g., "WP3 – Pilot Testing")
- **Task Cards**: Each task corresponds to a task card linked to its deliverable or milestone
- **Subtasks**: Used for breaking down task responsibilities among partners
- **Custom Fields**: For progress %, status (To Do, In Progress, Completed), risk flag, quality assurance validation
- **Dependencies**: Defined between tasks and deliverables to visualise implementation logic
- **Dashboards**: Auto-generated for project-wide, WP-level, and time-specific overviews
- **Calendar Integration**: With milestone reminders, submission dates, and meeting links
- **Document Attachment and Commenting**: For traceable documentation and discussion history

Monitoring Reports Generated Through ClickUp:

- **Weekly Activity Snapshot**: Used by WP Leaders for internal checks
- **Monthly Task Completion Overview**: Cross-checked by quality assurance
- **Quarterly SC Dashboard**: Consolidated by Coordinator using ClickUp exports
- **Deviation Alerts**: Triggered via task status updates or dependency shifts

This system ensures that all partners have equal visibility, and that data flow is real-time and traceable.

3.4 Responsibility Escalation Logic

Detected Issue	Reported By	Reviewed By	Decision By
Task delay <10 days	Task Leader/Team Member	WP Leader	WP-internal adjustment
Task delay >10 days or interdependent delay	WP Leader	PM Team	Timeline adjustment or resource reallocation
Repeated partner non-performance	WP Leader or PM Team	SC	Role reassignment or contractual action
Deliverable misalignment with the proposal	PM Team	SC + Coordinator	Content revision or formal amendment proposal

4. MONITORING TOOLS AND INDICATORS

To ensure precision, standardisation, and actionable reporting in monitoring, the EPD-Net Project utilises a combination of **indicators**, supported by **digital tools**, **checklists**, and **template-based documentation**. This layered approach allows project actors to move seamlessly from granular task updates to consolidated project-level dashboards.

Monitoring in the EPD-Net Project is built upon the following three pillars:

1. **Well-defined indicators** across all project dimensions (progress, quality, participation, engagement, sustainability)
2. **Digital platforms** and instruments enabling real-time monitoring (primarily **ClickUp**)
3. **Structured documentation templates** for traceability and decision support

To ensure precision, standardisation, and actionable reporting in monitoring, the EPD-Net Project employs a comprehensive performance tracking system, utilizing a combination of Key Performance Indicators (KPIs) and PIs, as outlined in the annexes. This layered approach allows project actors to move seamlessly from granular task updates to consolidated project-level dashboards.

4.1 Traffic Light Monitoring System

To enhance readability and responsiveness, a **color-coded traffic light system** is used to flag task and WP statuses across dashboards and reports:

Color	Meaning	Action Required
🟢 Green	On track	No action needed
🟡 Yellow	Slight delay or partial deviation	monitor closely; corrective micro-adjustments
🟠 Orange	Major deviation or risk present	Escalation to WP Lead; Quality assurance/Risk review
🔴 Red	Off-track, overdue or blocked	Immediate intervention by Coordinator / SC

These colour codes appear automatically in ClickUp via custom field automation and are summarized in the **QMR** for each WP and Deliverable.

4.2 Indicators Linked to Risk Management

Monitoring outcomes directly feed into the **Risk Register**. For example:

- Delays in data collection (R2)
- Low pilot participation (R5)
- Underperformance in dissemination impact (R7)

In such cases, the **Monitoring Report** triggers either:

- **Automatic updates** to existing risk entries
- **Creation of new unforeseen risk entries** (if criteria are met per related part of D.1.2)

4.3 Digital Integration and Traceability

All monitoring indicators and tools are digitally integrated into:

- **ClickUp**: Daily/weekly task monitoring
- **Shared Workspace (on ClickUp)** : Monitoring templates and logs
- **Shared Repository (e.g., ClickUp)**: Final reports and evidence archives
- **EU Funding & Tenders Portal**: Continuous Reporting Module (Quarterly summaries → EC)
- **EPD_Assist**: Automatically collected behavioral and performance data during training module use

This ensures that **all monitoring data is traceable, exportable, and auditable**, fulfilling both internal management needs and external funder expectations.

5. MONITORING SCHEDULE AND REPORTING FLOW

A well-defined schedule and reporting mechanism is central to ensuring the **timely, structured, and actionable use of monitoring data** across all levels of project governance. In EPD-Net Project, monitoring is organized in **recursive cycles**, synchronized with the project's Gantt chart, deliverable deadlines, milestone checkpoints, and continuous reporting obligations to the EC.

This section outlines the project's monitoring frequency, reporting responsibilities, escalation logic, and alignment with external evaluation points.

5.1 Monitoring Schedule by Frequency and Scope

EPD-Net Project implements a **multi-frequency monitoring approach**, calibrated according to the granularity and strategic weight of each monitoring task.

Frequency	Monitoring Focus	Tool/Output	Responsible
Continuous	Task-level updates, subtask progress	ClickUp task board, dependencies	Task Contributors
Weekly	Partner engagement, workload balance	Activity snapshot (ClickUp)	WP Leaders
Monthly	WP progress, early warning signs	WP Monitoring in Clickup	WP Leaders
Quarterly	Project-wide synthesis, status classification, risk update	QMR (Quarterly Monitoring Report)	Coordinator + PM Team
Milestone-Based	Key deliverable readiness, pilot/event checkpoints	Milestone Review Memo	WP Leader + PM Team
Annual	Longitudinal progress and alignment check	Annual Monitoring Summary	SC + External Evaluators
Ad hoc	Deviation alert, unforeseen event	DAF on the Clickup	Any Partner → WP Lead → Coordinator

5.2 Monitoring Events and Calendar Anchors

Monitoring in the project will be managed through ClickUp, with real-time tracking of progress, risks, and milestones using a Gantt chart-based approach. This will allow for continuous monitoring without fixed month-based references, ensuring flexibility and efficiency in project management. The following key monitoring activities will be tracked through ClickUp:

- **Risk Management Plan delivery**: Baseline establishment in ClickUp and Risk Register
- **Consortium meeting in Czechia**: Validation of project status, tracked via ClickUp task cards
- **Quality Assurance Evaluation + Dissemination Midterm Review**: Integration of Quality Assurance, Monitoring, and Risk checkpoints within ClickUp

- **Monitoring data for reviewer access**: Data preparation and review process in ClickUp for streamlined access
- **Pilot completion review**: Input for module iteration and dissemination, tracked in ClickUp
- **Sustainability scenario testing**: Progress assessment for WP5-WP6 adoption goals within ClickUp dashboards
- **Final internal audit**: Monitoring summary for final report and risk close-out through ClickUp task tracking
- **Final project reporting**: Final QMR submission and EU Portal upload through ClickUp

By utilizing ClickUp's Gantt chart and task tracking features, all monitoring activities will be continuously updated, providing a dynamic and flexible approach to ensure the project stays on track and any issues are addressed in real-time.

5.3 Data Management, Storage, and Access

As ClickUp serves as the primary working environment for the project, it will also be the central location for the storage and management of all monitoring-related data and documents. To ensure consistency and easy retrieval, the following practices will be followed:

a) Naming Standards

All documents related to monitoring will adhere to a standardized naming convention to ensure clarity and organization. The format will be as follows:

- **Format**: Monitoring_[WP#]*[Partner]*[MonthYear].xlsx/.docx

b) Data Storage

All monitoring data, reports, and documents will be stored within ClickUp for seamless access and management. Additionally, the data will be backed up quarterly to ensure data integrity and continuity. A shared cloud repository will be used for storing final versions, with access organized as follows:

- **Primary Location**: ClickUp (Centralized storage for all data and documents)
- **Backup**: Quarterly backups of ClickUp exports and shared cloud folders

c) Access Permissions

Access to monitoring data and documents will be granted based on the role and responsibilities within the project. The access levels are as follows:

- **Editable**: Coordinator, WP Leaders, PM Team
- **Read-only**: All consortium members
- **Audit Access**: External evaluators (accessible upon request)

These protocols will be outlined in more detail in the Communication Management Plan to ensure clear guidance on data handling and sharing procedures across all project teams.

6. CONCLUSION

The EPD-Net Project Monitoring Plan (D1.3) has been designed and implemented as a **comprehensive, multi-layered governance instrument**, providing an integrated structure for tracking, analysing, and responding to all aspects of project implementation. Developed under WP1, and in direct alignment with the QAP (D1.1) and RMP (D1.2), this monitoring framework ensures that the project remains not only on schedule and within scope, but also strategically adaptive and stakeholder-responsive.

6.1 Key Achievements of the Monitoring Framework

- Establishes **six core monitoring dimensions**—progress, performance, participation, engagement, finance, and sustainability—each mapped to clear indicators and tools.
- Ensures **full alignment with the GA** obligations (notably Articles 17, 21, and 39) and the Description of Action.
- Integrates with the project's broader quality ecosystem, directly feeding into the quality assurance review logic, risk escalation triggers, and external reporting tools (e.g., EU Continuous Reporting platform).
- Leverages **ClickUp** as a real-time collaborative digital environment for status tracking, document control, dependency management, and dashboard visualization.
- Includes an advanced **Traffic Light System** and standardized reporting formats (QMRs, DAFs, WP Sheets) to ensure comparability, visibility, and traceability across the consortium.
- Defines **clear roles and responsibilities** at every governance level, ensuring task leaders, WP leaders, the Coordinator, PM team, and the SC interact seamlessly through defined reporting and escalation cycles.

6.2 Strategic Added Value

Beyond its procedural role, the PMP serves a deeper purpose: it enables EPD-Net Project to remain **learning-driven, reflexive, and impact-oriented**. By embedding monitoring into daily operations and governance logic, the plan transforms simple data into strategic insight—allowing the consortium to anticipate challenges, correct course, and deliver lasting value to its stakeholders.

7. ANNEXES

The supporting information for the monitoring plan is given in the Annexes below:

Annex 1. Monitoring Schedule Calendar

Purpose

This annex provides a **visual reference timeline** of the major monitoring actions planned throughout the project lifecycle. It supports synchronization among all consortium members and aligns monitoring activities with **milestones, deliverable deadlines, WP coordination routines, QA checkpoints**, and **risk review cycles**.

Monitoring Events Timeline

Month (M)	Event / Action	Monitoring Tool	Responsibility	Linked Output
M1	Kick-off Meeting + Setup of ClickUp	ClickUp Config Report	Coordinator	Internal Guide
M2	QAP finalization	Quality Assurance Framework	PM Team	D1.1
M3	Risk Register launched	Risk Tracker	Coordinator	D1.2
M4	Monitoring Plan submitted	This PMP	WP1 Leader	D1.3
M5	First full WP Monitoring	WP Monitoring Template	WP Leaders	Internal
M6	First Quarterly Monitoring Report (QMR) + Czechia SC Review	QMR	Coordinator	QMR #1
M9	WP-level Engagement Report	ClickUp Dashboard	WP2, WP3	Internal
M12	Mid-Year Quality Assurance Evaluation + Risk Update	Quality Assurance Matrix / Risk Register	PM Team	Quality Assurance/Risk Integration
M15	Start of Pilot Testing Monitoring	EPD_Assist Logs + Attendance Sheets	WP4	Pilot Data

Month (M)	Event / Action	Monitoring Tool	Responsibility	Linked Output
M18	External Mid-Term Review	Consolidated Monitoring Portfolio	Coordinator	EC Evaluation Dossier
M21	WP5 Contribution Matrix Check	Contribution Template	Coordinator	Performance Update
M24	Sustainability Indicator Check	Stakeholder Interest Survey	WP5	Policy Alignment Memo
M30	Final Risk & Quality Assurance Reconciliation	Monitoring Summary Table	PM Team + Coordinator	Risk Wrap-up Notes
M34	Internal Closure Audit	Monitoring Final Archive	SC + PM Team	Internal Final Review
M36	Final Project Monitoring Report	Final QMR + EU Portal Summary	Coordinator	Final Reporting to EC

Color Legend for Monitoring Frequency

Symbol	Type of Action	Frequency
🟢	Task/Subtask Update	Continuous
🟡	WP Monitoring Sheet	Monthly
🟠	QMR (Quarterly Monitoring Report)	Quarterly
🔵	SC Review & Integration	Milestone-based
🔴	External Reporting	Annual or EC-driven

Visual Representation

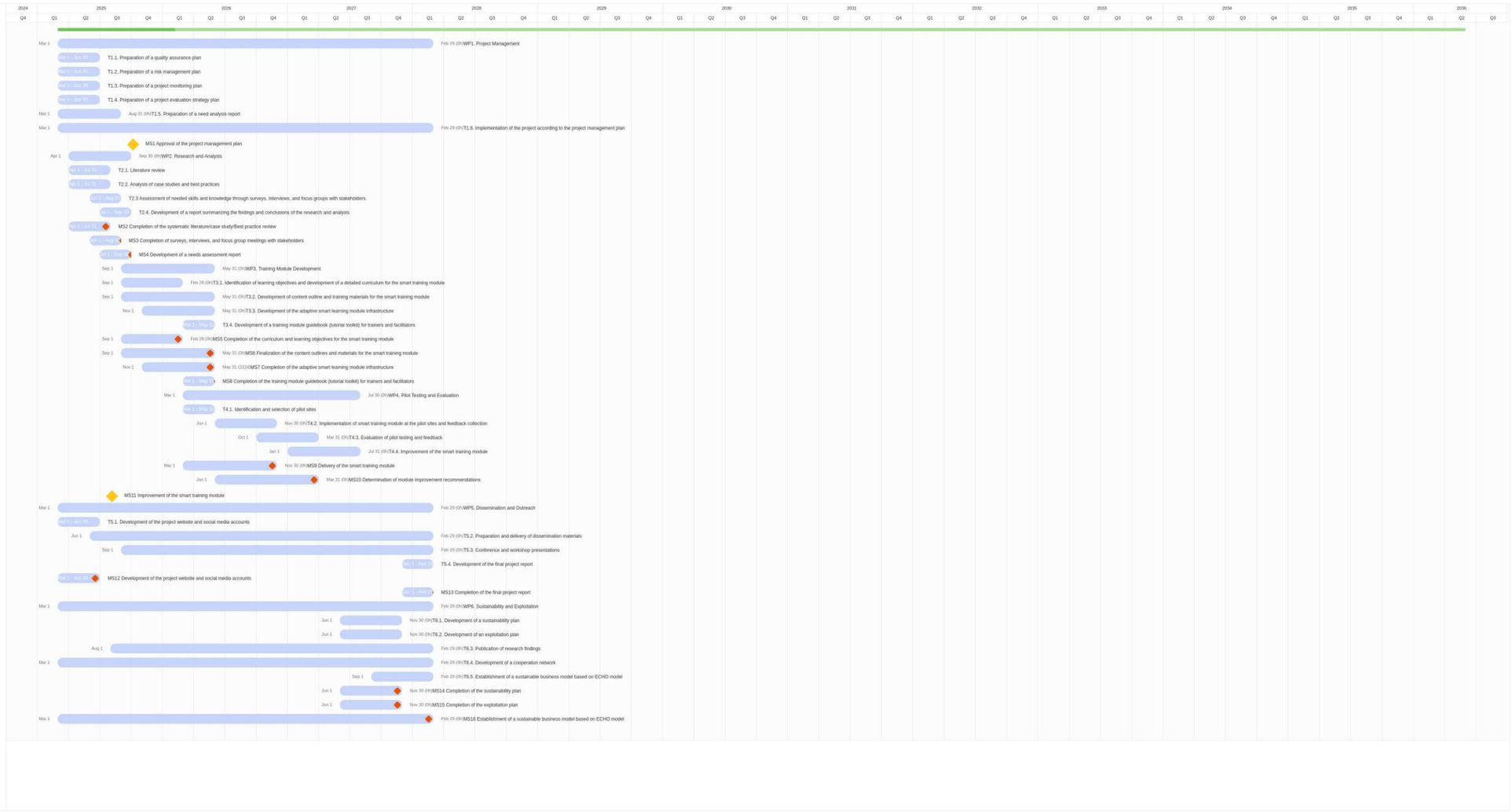
A horizontal **Gantt-style chart** can accompany this table, showing:

- Timeline from M1 to M36
- Rows for: WP1–WP6, Quality Assurance, Risk, Monitoring, EC Reporting
- Colored bars or icons representing the key monitoring actions at each month

While below chart provides a visual overview of the project timeline, please note that the Gantt chart is actively followed and managed within ClickUp, which serves as the central platform for tracking tasks, milestones, and overall progress. The chart in this document is included for reference purposes, while real-time monitoring and updates are handled directly in ClickUp.

Name	Assignee(s)	Start Date	Due Date
EPD Project Plan			
WP1. Project Management		Mar 1	Feb 29 2028
T1.1. Preparation of a quality assurance plan		Mar 1	Jun 30
T1.2. Preparation of a risk management plan		Mar 1	Jun 30
T1.3. Preparation of a project monitoring plan		Mar 1	Jun 30
T1.4. Preparation of a project evaluation strategy plan		Mar 1	Jun 30
T1.5. Preparation of a need analysis report		Mar 1	Aug 31
T1.6. Implementation of the project according to the…		Mar 1	Feb 29 2028
MS1 Approval of the project management plan		Oct 1	
WP2. Research and Analysis		Apr 1	Sep 30
T2.1. Literature review		Apr 1	Jul 31
T2.2. Analysis of case studies and best practices		Apr 1	Jul 31
T2.3 Assessment of needed skills and knowledge thr…		Jun 1	Aug 31
T2.4. Development of a report summarizing the findi…		Jul 1	Sep 30
MS2 Completion of the systematic literature/case stu…		Apr 1	Jul 31
MS3 Completion of surveys, interviews, and focus gr…		Jun 1	Aug 31
MS4 Development of a needs assessment report		Jul 1	Sep 30
WP3. Training Module Development		Sep 1	May 31 2026
T3.1. Identification of learning objectives and develo…		Sep 1	Feb 28 2026
T3.2. Development of content outline and training ma…		Sep 1	May 31 2026
T3.3. Development of the adaptive smart learning m…		Nov 1	May 31 2026
T3.4. Development of a training module guidebook (t…		Mar 1 2026	May 31 2026
MS5 Completion of the curriculum and learning objec…		Sep 1	Feb 28 2026
MS6 Finalization of the content outlines and material…		Sep 1	May 31 2026
MS7 Completion of the adaptive smart learning mod…		Nov 1	May 31 2026
MS8 Completion of the training module guidebook (t…		Mar 1 2026	May 31 2026
WP4. Pilot Testing and Evaluation		Mar 1 2026	Jul 30 2027
T4.1. Identification and selection of pilot sites		Mar 1 2026	May 31 2026
T4.2. Implementation of smart training module at the …		Jun 1 2026	Nov 30 2026
T4.3. Evaluation of pilot testing and feedback		Oct 1 2026	Mar 31 2027
T4.4. Improvement of the smart training module		Jan 1 2027	Jul 31 2027
MS9 Delivery of the smart training module		Mar 1 2026	Nov 30 2026
MS10 Determination of module improvement recom…		Jun 1 2026	Mar 31 2027
MS11 Improvement of the smart training module		Jul 31	Jul 31
WP5. Dissemination and Outreach		Mar 1	Feb 29 2028
T5.1. Development of the project website and social …		Mar 1	Jun 30
T5.2. Preparation and delivery of dissemination mate…		Jun 1	Feb 29 2028
T5.3. Conference and workshop presentations		Sep 1	Feb 29 2028
T5.4. Development of the final project report		Dec 1 2027	Feb 29 2028
MS12 Development of the project website and social…		Mar 1	Jun 30
MS13 Completion of the final project report		Dec 1 2027	Feb 29 2028
WP6. Sustainability and Exploitation		Mar 1	Feb 29 2028
T6.1. Development of a sustainability plan		Jun 1 2027	Nov 30 2027
T6.2. Development of an exploitation plan		Jun 1 2027	Nov 30 2027
T6.3. Publication of research findings		Aug 1	Feb 29 2028
T6.4. Development of a cooperation network		Mar 1	Feb 29 2028
T6.5. Establishment of a sustainable business model…		Sep 1 2027	Feb 29 2028
MS14 Completion of the sustainability plan		Jun 1 2027	Nov 30 2027
MS15 Completion of the exploitation plan		Jun 1 2027	Nov 30 2027
MS16 Establishment of a sustainable business mode…		Mar 1	Feb 29 2028

Add Task



Annex 2. ClickUp Dashboard Schema

Purpose

This annex outlines how the **ClickUp digital project management platform** is structured and used within EPD-Net for real-time monitoring. It provides a **visual and functional description** of how tasks, deliverables, partner contributions, dependencies, and progress indicators are organized, tracked, and visualized using the platform. The dashboard setup ensures that all partners can collaborate efficiently and transparently within a **standardized and auditable environment**.

a) Workspace and Hierarchy Structure

EPD-Net's ClickUp environment is organized using a **tiered hierarchy** that mirrors the WP and task structure.

Each **task** within a folder corresponds to a WP, with **subtasks** used to define activities and related deliverables and allocate responsibilities across partners.

The detailed structure of the project is shown in the Gantt Chart above.

b) Key Functional Elements Configured in ClickUp

Feature	Purpose	Implementation
Task Cards	Represent project activities and deliverables	Includes description, attachments, assigned members
Subtasks	Assign workload to specific partners	Labeled by institution (e.g., [HU], [NMBU])
Custom Fields	Add structured data to each task	% Progress, Status, Quality Assurance Check, Risk Flag
Dependencies	Visualize relationships and sequencing	"Blocked by", "Waiting on", or "Triggers"
Status Categories	Show current state of task	To Do / In Progress / Review / Completed
Time Estimates	Track planned vs actual partner effort	Hours logged via ClickUp or synced from time sheets
Comments	Record team communications	Internal discussion, document links, decision logs

c) Dashboard Types and Use Cases

Dashboard View	Content	Audience	Purpose
WP Overview Dashboard	Task status, deliverable progress, delays	WP Leaders	Monthly coordination
Partner Activity Dashboard	Tasks assigned to each partner, hours worked	Coordinator, SC	Performance tracking

Dashboard View	Content	Audience	Purpose
Milestone Timeline Dashboard	Gantt view of upcoming milestones and dependencies	Entire Consortium	Strategic planning
Quality Assurance Tracker Dashboard	Quality Assurance check status per output	PM Team, WP Leads	Quality assurance compliance and control
Red Flag Monitor	Tasks marked with high risk or major delay	Coordinator, SC	Escalation and resolution

All dashboards are configured using ClickUp's **custom views**, filters, and automations. They are exported quarterly and included in the **QMR**.

d) Integration with Other Monitoring Elements

- **ClickUp task status** feeds into the **Traffic Light System** in Annex 3
- Task-level data supports indicators
- Completion logs are reviewed by the **PM Team** during deliverable checks
- Comments and documents are automatically **archived and traceable** for audits and evaluation.

Annex 3. Traffic Light System Legend

Purpose

The **Traffic Light System** is a visual, intuitive, and action-oriented monitoring mechanism embedded in EPD-Net's ClickUp dashboards and QMRs. It allows consortium members, WP leaders, and the SC to **instantly interpret the status of tasks, deliverables, and WPs** and determine whether action or escalation is required.

This annex provides the **interpretation key (legend)** for each color category and defines the corresponding **response strategy**, ensuring consistency across monitoring outputs and management decisions.

a) Traffic Light Colour Legend

Color	Status Definition	Monitoring Signal	Action Required	Escalation Level
Green	On track	Task/deliverable is progressing as planned	Continue standard monitoring	None
Yellow	Slight delay or partial deviation	Minor issue; task still manageable within buffer	Notify WP Leader; monitor closely	None unless prolonged
Orange	Significant delay, quality concern, or resource mismatch	High-risk deviation or recurring underperformance	Submit DAF; initiate mitigation	Coordinator review
Red	Critical delay, major non-compliance, or partner inaction	Task or deliverable at risk of failure; milestone blocked	Escalate to SC; activate contingency plan	SC decision required

b) When and Where the Traffic Light System Is Applied

Application Area	Tool/Platform	Frequency
Task Status (ClickUp)	ClickUp Custom Field: "Status Indicator"	Continuously updated
WP Monitoring Sheets	Monthly WP Reports to be created on the ClickUp	Monthly
Quarterly Monitoring Report (QMR)	Color-coded summaries per WP and Deliverable to be created on the ClickUp	Quarterly
Milestone Reviews	Embedded in SC Review Memos	Quarterly (SC Meetings)
Quality Assurance Evaluation	Included in Output Evaluation Tablesto be cerated on the ClickUp	At each deliverable check

c) Escalation Triggers Based on Colour Transitions

From–To	Interpretation	Escalation Action
🟢 → 🟡	Minor delay identified	Flag in WP Monitoring Sheet
🟡 → 🟠	Issue unresolved or worsened over 1–2 cycles	Initiate risk review and mitigation discussion
🟠 → 🔴	Task compromised; risk realized	Submit DAF + SC convenes to resolve
🟢 → 🔴 (sudden)	Unforeseen crisis or force majeure	Immediate SC notification + contingency response (per D1.2)

d) Integration with Other Annexes and Plans

- **Feeds into Risk Register (D1.2)** → Tasks at 🟠 or 🔴 automatically logged as potential or realized risks
- **Documented in QMRs (D1.3)** → Used to classify WP status summaries per quarter

Annex 4. Reporting Flow Diagram

Purpose

This annex presents a **visual and procedural map** of the reporting flow within EPD-Net's monitoring system. It defines how monitoring data is collected, reviewed, escalated, and transformed into actionable intelligence and formal reports. The diagram ensures that all consortium members understand **who reports what, to whom, when, and through which tools**.

The reporting flow supports:

- **Transparency and traceability**
- **Timely escalation of issues**
- **Synchronization with quality assurance and risk management**
- **Alignment with EC continuous reporting obligations**

a) Step-by-Step Reporting Process

A[Task Contributors] -->|Update Task Cards| B[ClickUp System]

B --> C[WP Leaders]

C -->|Monthly WP Monitoring Sheet| D[Project Coordinator (ESTU)]

D -->|Quality Assurance Cross-Check| E[PM Team]

D -->|Quarterly Monitoring Report (QMR)| F[SC]

E --> F

F -->|Decision Notes + Resolutions| G[Consortium Partners]

F -->|Final Status & Summary| H[EC Continuous Reporting Tool]

B -->|Status Export| D

D -->|Deviation Alerts| F

b) Reporting Layers and Responsibility Matrix

Reporting Layer	Data Type	Tool / Format	Frequency	Responsible
Task Level	Progress %	ClickUp Card	Continuous	Task Leaders
WP Level	Task status + summary	WP Monitoring Sheet to be created on the ClickUp	Monthly	WP Leaders

Reporting Layer	Data Type	Tool / Format	Frequency	Responsible
Project Level	Aggregated WP data	QMR (Quarterly Report) to be created on the ClickUp	Quarterly	Coordinator
Quality Control	Quality Assurance check status	Quality Assurance Checklist to be created on the ClickUp	Per deliverable	PM Team
Risk Update	Deviation / Risk Entry	Risk Register + DAF to be created on the ClickUp	As needed	WP Leads / Coordinator
Strategic Oversight	Monitoring synthesis	SC Memo	Milestone-based	SC Chair
External Reporting	Project progress	EU Continuous Reporting Tool	Quarterly / Event-based	Coordinator

c) Integration Points with Other Plans

Source	Target Output	Triggered Plan
WP Monitoring Sheet → Risk Flag	DAF	RMP (D1.2)
Quality Assurance Checklist → Quality Assurance Score < Threshold	Deliverable Revision	QAP (D1.1)
Task Card → % < 50% at Mx	Highlighted in QMR	PMP (D1.3)
Stakeholder Feedback → Satisfaction < 3/5	Review by WP4	Quality Assurance + Dissemination Strategy
Repeated 🟠 / 🔴 Status	Escalation Memo	SC Action

d) Standard Turnaround Times

Action	Time Limit	Initiated By
Submit WP Monitoring Sheet	Within 5 days of new month	WP Leader
Compile QMR	Within 10 days of quarter end	Coordinator
Review Deviation Alert	Within 7 days	SC
Update EC Portal	Within 15 days after QMR finalization	Coordinator

Annex 5. DAF Template

Purpose

DAF is a standardized tool for reporting significant deviations from planned timelines, task execution, deliverable quality, partner contributions, or engagement levels. This form allows EPD-Net partners and WP leaders to formally notify the Project Coordinator and SC of emerging issues, triggering timely mitigation or escalation procedures as outlined in the RMP (D1.2).

To streamline this process and ensure real-time tracking, DAFs should be created and managed directly in ClickUp, where all deviations will be logged, monitored, and integrated into the project's risk and monitoring system. This eliminates the need for separate documents and ensures that all deviations are documented, traceable, and easy to access.

a) DAF – ClickUp Integration

Whenever a deviation occurs, the respective WP Leader, Partner Representative, or PM Team is expected to log the deviation in ClickUp using the platform's built-in DAF. The process is as follows:

- Identification: Select the relevant task or deliverable in ClickUp, and use the "Deviation Alert" feature to document the issue.
- Deviation Description: Provide a clear, factual description of the deviation (e.g., timeline slippage, resource shortfall, underperformance, etc.).
- Supporting Evidence: Attach any relevant documents, such as ClickUp task logs, screenshots, or meeting notes, directly within the form.
- Proposed Immediate Action: If applicable, indicate any actions taken or proposed to mitigate the deviation.
- Recommendation for Project-Level Action: Define the required response (e.g., internal WP-level resolution, reassignment of responsibilities, escalation to SC).
- Follow-up: After submission, the form will trigger an automatic review and update in the project's risk register, with further actions scheduled as needed.

b) ClickUp Submission Process

- Format: The DAF is created directly within ClickUp.
- Submission Channel: The alert is automatically submitted to the Project Coordinator and logged in the shared "Monitoring/DAFs" folder in ClickUp.
- Notification Trigger: An automatic notification will be triggered if the deviation is marked as major (🟠) or critical (🔴) in ClickUp.

- Review Process: The Project Coordinator or PM Team will review the alert and take appropriate actions, ensuring updates are integrated into the project's monitoring and risk records.

Annex 6. Partner Contribution Monitoring Matrix

Purpose

This matrix tracks the **planned vs. actual contributions of each partner** across all WPs, offering a transparent view of:

- Task fulfillment rates
- Role adherence and balance
- Equity in workload distribution
- Early detection of underperformance

It supports both internal performance reviews and external audits by offering a **quantitative partner-level accountability tool**, integrated with WP monitoring sheets, ClickUp time logs, and reporting for the EU Continuous Reporting Platform.

a) Sample of the Monitoring Matrix

Partner	WP Roles	Planned Tasks / Deliverables	Completed (Y/N)	% Completion	Reported Hours vs. Plan	Participation Notes
ESTU (Coordinator)	WP1 Lead, WP4, WP6	D1.1, D1.2, D1.3, D4.2, D6.3	Y	100%	88%	On track; strong coordination role
AIJU	WP2 Lead	D2.1, D2.2, D2.3	Y	100%	91%	Highly active in content development
IKU	WP3 Lead	D3.1, D3.2	Y	95%	92%	Pilot reports on time; high attendance
NMBU	WP6 Lead	D6.1, D6.2	N (D6.2 in progress)	75%	68%	Slight delay in exploitation task
HU	WP5 Co-lead	D5.1, D5.2	Y	100%	85%	Strong policy integration role
CTLA	WP5 Partner	D5.2	Y	100%	80%	Active in stakeholder engagement
LAAA	WP4 Lead	D4.1, D4.3	Y	100%	96%	Excellent local outreach and feedback

Partner	WP Roles	Planned Tasks / Deliverables	Completed (Y/N)	% Completion	Reported Hours vs. Plan	Participation Notes
MENDELU	WP2 Support	D2.2	Y	100%	100%	Technical testing role complete
VSB	WP4 Support	D4.3	Y	100%	102%	Hosted M6 meeting; overcontributed
All Partners	WP1, WP4	Partner reporting	Partial	varies	70–100%	Some minor gaps in early WP reports

Note: Data reflects status as of M12. Matrix updated quarterly.

b) Interpretation and Use

This matrix is reviewed:

- **Quarterly** by the Coordinator and SC
- As part of the **Quality assurance cross-checks** and **QMR synthesis**
- To identify:
    - Imbalance in partner effort
    - Recurrent non-responsiveness
    - Need for task reallocation or support

Color-coding can be applied to the table in live versions (e.g., Green ≥85%, Yellow 70–84%, Red <70%) for quick interpretation.

c) Data Sources Feeding the Matrix

- ClickUp time logging reports
- Monthly WP Monitoring Sheets
- Partner self-reporting forms (if applicable)
- Deliverable submission logs
- Quality assurance validation comments

d) Link to Other Plans

Plan	Integration Point
QAP (D1.1)	Validates contribution against expected quality input
RMP (D1.2)	Underperformance triggers R10 (Partner disengagement)
Dissemination Plan (WP5)	Contribution affects outreach coverage